

# WISCONSIN WORKS (W-2) CONTRACT AND IMPLEMENTATION COMMITTEE

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201 E. Washington Avenue  
GEF 1, Room 400X  
Madison, WI 53707

**Friday, December 17, 1999**  
10:00 AM - 2:00 PM

## **MINUTES**

**The W-2 Contract and Implementation Committee is the single point of contact for feedback to the Department of Workforce Development on policy implementation related to W-2 agencies, and includes representation from the Wisconsin County Human Service Association (WCHSA), Urban Caucus counties, W-2 private agencies in Milwaukee County and the balance of state, and Tribal W-2 agencies.**

### **Committee**

**Attendees:** Jean Rogers, Chair; Phyllis Bermingham, Marathon Co. Employment and Training; Mary Ann Cook, Dane Co. Dept. of Human Services; Rosa Dominguez (alternate), Opportunities Industrialization Center of Greater Milwaukee (OIC-GM); Deb Hughes (alternate), Southwest Consortium; Cheryl Cobb (alternate), United Migrant Opportunity Services (UMOS); Jim Krivsky (alternate), Racine Co. Human Services Dept.; George Leutermann, MAXIMUS; Jim Nitz, Kaiser Group; Rita Renner (alternate), YW-Works; Shirley Ross, La Crosse Dept. of Human Services, Ed Kamin (alternate), Kenosha Co. Division of Workforce Development

### **State Staff**

**Attendees:** Karen Aasen, DWD; Robert Blaine, DOA; Nancy Buckwalter, BDS; Stephen Dow, BWSP; Dave Edie, OCC; Anthony Esealuka, BFS; Tim Hineline, BWSP; Ceri Jenkins, BWSP; Germaine Mayhew, DES Training Section; Margaret McMahon, BWSP; Karen Messinger, BFS; Jude Morse, BDS; Dianne Reynolds, BWSP; Paul Saeman, DES; Joseph Stafford, BFS; John Tuohy, DWE; Jan VanVleck, DWD; Alice Wilkins, BWSP

**Absent:** Barbara Metoxen, Oneida Nation; Kim Mooney, Fond du Lac Co. Dept. of Social Services; Glynis Underwood, Employment Solutions; Michael Van Dyke, Door Co. Dept. of Social Services

**Guests:** Jane Bartha, Kaiser Group; Dick Buschman, Milwaukee County DHS; Tim Cowan, YW-Works; Mona Garland, MAXIMUS; Liz Green, Rock Co. DSS; Teresa Pierce, Western Wisconsin Private Industry Council (PIC); Marilyn Putz, Walworth County, Kaiser Group; Joseph Taylor, Employment Solutions, Inc

**Recorder:** Shari Busse, W-2 Contract and Implementation Committee Coordinator

### **Welcome**

Jean Rogers welcomed everyone to the meeting, wished them a happy holiday and a happy New Year!

### **November 1999 Minute Approval**

A motion was made by Deb Hughes to approve the November 19, 1999 minutes and seconded by Jim Nitz. Motion carried.

### **Issue/Discussion: 2000 Meeting Schedule, Jean Rogers**

Jean Rogers asked the committee to review the tentative meeting dates for 2000 and suggested scheduling the meetings in room 400X of GEF 1 as much as possible. Since April 21, 2000 is Good Friday, the committee agreed to move that month's meeting to Wednesday, April 19, 2000. With that change, George Leutermann moved to approve the 2000 meeting schedule; seconded by Jim Nitz. Motion carried.

Date	Time	Scheduled Location
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Friday, January 21, 2000	10:00 a.m. – 2:00 p.m.	201 E. Washington Avenue, GEF 1, Room 400X Madison, WI 53707
Friday, February 18, 2000	10:00 a.m. – 2:00 p.m.	201 E. Washington Avenue, GEF 1, Room 400X Madison, WI 53707
Friday, March 17, 2000	10:00 a.m. – 2:00 p.m.	201 E. Washington Avenue, GEF 1, Room 400X Madison, WI 53707
Wednesday, April 19, 2000	10:00 a.m. – 2:00 p.m.	
Friday, May 19, 2000	10:00 a.m. – 2:00 p.m.	201 E. Washington Avenue, GEF 1, Room 400X Madison, WI 53707
Friday, June 16, 2000	10:00 a.m. – 2:00 p.m.	
Friday, July 21, 2000	10:00 a.m. – 2:00 p.m.	
Friday, August 18, 2000	10:00 a.m. – 2:00 p.m.	
Friday, September 15, 2000	10:00 a.m. – 2:00 p.m.	
Friday, October 20, 2000	10:00 a.m. – 2:00 p.m.	
Friday, November 17, 2000	10:00 a.m. – 2:00 p.m.	
Friday, December 15, 2000	10:00 a.m. – 2:00 p.m.	

#### **Issue/Discussion: Y2K Update, Nancy Buckwalter, DES/BDS**

Nancy Buckwalter distributed the Administrator's Memo that includes the final version of the Y2K checklists. The IT Systems checklist, page 4 of the memo, has been divided into three sections for better clarity. The first section must be completed by all locations and can be completed before Sunday, January 2, 2000. The second section relates to CARES and can not be completed until noon on Sunday. Only DWD staff must complete the third section. Nancy also distributed sample handouts regarding Year 2000 Questions that agencies may wish to share with their customers.

Agencies should check the DWD website [www.rollover2k.com](http://www.rollover2k.com) for the most current Y2K information at the State level. The DWD Internet site [www.dwd.state.wi.us](http://www.dwd.state.wi.us) will be down from 7:00 a.m. on December 31, 1999 until 7:00 a.m. January 3, 2000 to avoid potential computer hacker problems. This will not affect access to the rollover information site.

#### **Issue/Discussion: Workforce Attachment and Advancement (WAA)**

*Noncustodial Parent Eligibility* – John Tuohy, DWE

Wisconsin must apply the federal TANF requirements and the state 200% of poverty income limit and do eligibility determinations for Noncustodial Parents (NCPs) to receive employment-related services under the second purpose of TANF. The federal TANF regulations appear to give states some flexibility in determining which NCPs are made eligible for non-assistance services. The Department recommends that NCPs should be eligible for TANF non-assistance services based on either the NCP being low income or the children being low income. This approach provides broad flexibility in making NCPs eligible for TANF services, while limiting the extent of eligibility verification necessary. Local agencies will have the responsibility for determining which NCPs to serve, based on the service needs of the individual NCPs and the resources available to the local agencies. Through contract agreements with DWD, agencies can be directed if necessary to give priority for service to a subset of the total eligible NCP population, such as those NCPs who are low income and have children receiving assistance. This recommendation will need to be approved by the Joint Finance Committee at the 13.10 meeting on the WAA program.

Deb Hughes asked for clarification regarding the child support referral mechanism for a broader TANF population. This issue requires further discussion with the Bureau of Child Support. Jim Nitz questioned what the intent was for expanding services beyond the Children First program. John Tuohy indicated this issue arose out of WAA discussions but is a broader TANF eligibility issue not a Children First issue. WAA was designed following the Welfare to Work model with NCP eligibility tied to a low-income child. However, the Department received feedback regarding agencies desire to serve low income NCPs regardless of the income of the child. By defining needy as a low income NCP or an NCP with a low-income child provides the maximum flexibility for providing services to NCPs under WAA, Community Reinvestment, and other TANF funded programs.

Jim Krivsky indicated that cooperation with child support is defined in relation to the custodial parent and this may require further definition regarding NCP cooperation. He also asked for clarification regarding incarcerated individuals. An individual may be jailed for failing to cooperate with a child support order. Although they may not be able to change the sentence, they could cure their exclusion from receiving TANF services by cooperating with child support. Committee members were asked for input regarding distribution of this policy change, which is effective immediately. This information will be shared as part of the WAA information. In addition, members agreed it should be distributed as an Administrator's Memo.

#### *Enrollment/Plan Options – John Tuohy, DWE*

John Tuohy stated that the flexibility in WAA plan options might be confusing since W-2 agencies and Workforce Development Boards (WDBs) are allowed to submit separate plans, joint plans or combined plans:

- Separate (W-2 or WDB) – Individual plans which are submitted by the W-2 agency or WDB. The services provided by either the W-2 agency or the WDB still must be coordinated in the job center delivery system.
- Joint Plan – A single plan that combines both W-2 and WDB for the entire Workforce Development Area (WDA). Both groups of agencies can still provide WAA services to the populations they currently work with.
- Combined Plan – Groups of agencies can send individual plans, which include sections that apply to both tracks of funding, or a combined package for some of the agencies in a WDA.

Agencies should notify their Area Administrators of their intent to submit either a joint or combined plan. Deb Hughes asked for clarification regarding submission of plans for the Southwest Consortium. The WDB can submit one plan with the 5 counties of Grant, Green, Iowa, Lafayette and Richland and another plan with Rock County. Regardless of which type of plan submitted, all WAA plans are due no later than Friday, January 14, 2000. DES and DWE will provide a response to W-2 agencies and WDBs within 30 days of receipt of a complete WAA plan.

WAA contract documents will be issued soon. John indicated that W-2 failure to serve and RFP performance standards provisions of W-2 contracts and the Community Reinvestment 10% limit on group services do not apply to WAA. If a W-2 agency is transferring 100% of their funds to the WDB, there is no need to do a contract. Partial transfers will require a contract modification. CARS advances will be available by March 1, 2000. Allocations for Track 1 are based on W-2, FSET, diversions, NCPs and child care (August 99 caseload data except NCPs). The question was raised regarding the possibility of changes in the FSET numbers. The same methodology was used for W-2 allocations and changes in FSET counts would not make significant changes in allocation amounts per individual agencies.

The WAA grants will be effective January 1, 2000 through December 31, 2001. Costs incurred in January will be allowable costs if the plan is approved, although agencies take a risk if they incur costs prior to plan approval. Regarding enrollment options, John indicated that the track 1 and track 2 concept is primarily for funding purposes and the CARES design issue will further define enrollment options. Jim Nitz asked if an agency receives both tracks would it be necessary to track them separately. The fiscal system may require separate tracking. In addition, agencies may want to track separately for performance measurement purposes. Rosa Dominguez asked for clarification regarding who is responsible if someone is being served by both tracks. This information must be identified in the plan. Deb Hughes recommended that allowing co enrollment in track 1 and track 2 gives both agencies the documentation needed. A combined plan could possibly be a track 3.

Authority to begin spending will require DWD approval of the WAA plan, Joint Finance Committee release of the funds and a signed and returned contract agreement. The Joint Finance Committee is scheduled to review this item on Tuesday, December 21, 1999. John shared a copy of the Legislative Fiscal Bureau paper prepared by Joanne Simpson which lists three alternatives for processing the request to release the funds:

1. Approve the Department's request to transfer the funds to DWD to implement WAA;
2. Approve the Department's request to transfer the funds to DWD to implement WAA with one or more modifications;
3. Deny the Department's request.

#### *Community Reinvestment (CR) – Alice Wilkins, DES/BWSP*

Alice Wilkins distributed the draft Administrator's Memo, Community Reinvestment Funds – Next Process 1997-1999 W-2 Contract. The purpose of the memo is to provide instructions for accessing the CR funds from the 97-99 W-2 contract.

The Department will begin its review of new CR plans on January 10, 2000. W-2 agencies should submit CR plans to their Contract Manager using the attached Community Reinvestment Plan Form. The form is separated into 3 parts:

Part A – Continuation of projects/activities approved under previously approved CR Plan from this agency;

Part B – Notification of intent to use CR to supplement W-2 and Related Programs contract;

Part C – Request for approval of activities/projects not previously approved for this agency.

The Department Contract Manager must review Part A or Part B CR plans within 15 days. Part C CR plans must be reviewed within 30 business days.

The memo stated that agencies may begin spending on CR activities that have been previously approved beginning January 1, 2000 and/or who plan to supplement the W-2 and Related Programs Contract. Any new and/or previously not yet approved activity is not an allowable expense until after the date on which the CR plans describing the proposed

activity is approved by the Department. This generated many questions. Jude Morse stated that there are two rounds of CR funding with the first round already approved and the second round effective January 1, 2000 for previously approved purposes and effective the plan approval date for new projects. Jean Rogers indicated that the Administrator's Memo reflects the intent of the Department to allow adjustments to existing plans to fall under the first category. Jim Bates, ASD budget analyst, was called for clarification on this issue. Jim stated that new projects are effective on the plan approval date. Prior to plan approval, agencies are at risk for assuming approval and liable for activities that are not approved. Jean stated that it is the Division's intent to allow agencies the flexibility to assume that risk if they so choose.

The memo further states that the agency CR plan must cover the full amount designated for the agency in the attached CR Projections Chart. Shirley Ross asked if that meant the 50% projection shown in the chart or double that amount. The CR plan must cover the potential 50% CR contract shown on the chart. The question was also raised regarding submitting amendments to the first CR plan so that a new project could become "old" and the second round of CR funding could be spent on these projects. Joe Stafford stated that many CR plans have already been submitted to the Regional offices pending the outcome of this process. Cheryl Cobb indicated that their agency would want to assume the risk and have expenditures backdated to January 1, 2000 once the plan is approved. She further stated that agencies took that risk with the first CR contract. Phyllis Birmingham asked that the language be changed to reflect that agencies may take the risk with activities not previously approved prior to plan approval.

Jim Nitz questioned why Part B of the CR Plan Form requests such specific budget categories. These same categories are included in the W-2 base contract as a result of discussions with the Legislative Fiscal Bureau. The same flexibility that agencies have under the base contract applies with the CR plan. George Leutermann stated that the Milwaukee W-2 agencies want to delegate their CR funds to Milwaukee County and asked for clarification regarding how to accomplish that. A plan to subcontract for CR services should be submitted to the Contract Manager.

Note: Based on this discussion, the Administrator's Memo was updated and approved by the Committee and the Secretary's Office indicating that agencies that expend funds on not yet approved activities prior to receiving approval are financially liable for those costs if they do not become approved. If an activity is approved, expenditures for that activity beginning January 1, 2000 will be considered allowable expenses for reimbursement.

#### *CARES design – Tim Hinline, DES/BWSP*

Tim Hinline asked for volunteers for a workgroup to determine the CARES business requirements for Community Reinvestment and Workforce Attachment and Advancement. The workgroup will begin meeting once a week in January and needs to include both Milwaukee and balance of State representation. Interested individuals should email Tim at [hinelti@dwd.state.wi.us](mailto:hinelti@dwd.state.wi.us) by December 31, 1999. Deb Hughes and Ed Kamin indicated their interest at the meeting.

#### **Issue/Discussion: Time Limits/Extension Requests, Margaret McMahon, DES/BWSP**

Margaret McMahon shared a template document of the most recent statistics on extension reviews received by the Department and cases that reached 24-months without an extension. Initial requests to the Department focused on the number of extensions received and approved; recent requests have broadened to include what has happened to those who have requested an extension. The Extension Reviews Received by DWD chart includes the most recent information: as of November 30, 1999, 112 extension requests have been submitted to DWD by the W-2 agencies. The Cases that Reached 24-Months without an Extension Request chart requires manually researching CARES data and indicates that as of October 31, 1999, 65 participants have reached their 24-month time limit without an extension. This information was released to the media by the Secretary's office media relations' team. Jean Rogers apologized for the lack of advance notice to the W-2 agencies. Members stated that items released to the press must be released to them.

Jean asked the committee for recommendations to clarify the information presented in the charts. Members asked for clarification regarding "Denied an extension at local agency level". Margaret indicated that cases in this category did not have an extension request submitted and no other closure reason could be identified in CARES. Most of these cases were denied based on lack of participation and non-cooperation with the program. It was suggested that this category be changed to "Individual not eligible for extension" on both charts. Margaret requested that additional suggestions be sent to her at [mcmahma@dwd.state.wi.us](mailto:mcmahma@dwd.state.wi.us).

Margaret also distributed a paper detailing the issue of processing applications for prior W-2 participants who have reached their 24<sup>th</sup> month. At the November W-2 Contract and Implementation Committee meeting, the question was asked how do agencies process W-2 applications for individuals that have reached their 24<sup>th</sup> month, their case closed

without an extension in place and now are reapplying for W-2 benefits. Cases may close without an extension in place for various reasons such as the participant was denied an extension by the W-2 agency or the participant got a job but then lost it. Upon reapplication, if the FEP determines the individual is appropriate for placement in an employment position other than the one in which the 24-month clock has expired, the application would be processed according to current policy. However, if the FEP determines that the individual is appropriate for placement in the same employment position for which the 24-month clock expired, a larger issue presents itself.

If the application is processed according to current policy and the FEP determines the individual is appropriate for placement in the expired employment position, the extension review process must also be included in the application processing period. Potentially, it may take a participant in this situation three (3) to four (4) months to receive a W-2 payment. To resolve this issue, W-2 agencies will be allowed to initiate a short-term, interim extension while they move through the normal extension determination process. The agency could immediately assign W-2 activities once W-2 eligibility has been determined and appropriate placement in the expired employment position completed. In most cases, the agency would know during the assessment phase if the applicant qualifies for an extension. However, in some situations the agency may need more time to make the extension decision; for example, if the individual was served by a different W-2 agency or if enough time has elapsed that the participant's circumstances have changed and need to be re-verified.

Additional policy decisions must be made related to this decision including:

- Would there be a period of time the case must be closed before the agency can make an interim decision?
- Would this be allowable for a transfer case or if a participant experiences a change in circumstances in the 24<sup>th</sup> month (or second half of the 23<sup>rd</sup> month)?
- Would this option be allowed if an extension request is not submitted until the 24<sup>th</sup> month due to agency error?
- How long would the interim decision last?
- If the extension were denied, would we have to consider the W-2 payments received by the participant an overpayment?

Margaret asked committee members to send their input regarding these areas or other questions to Mary Ann Cook at [cook@co.dane.wi.us](mailto:cook@co.dane.wi.us) by COB Monday, December 20, 1999. Rita Renner identified a current case meeting this definition and Margaret requested that they discuss that case individually.

#### *Monitoring Questions*

At the November meeting, committee members requested clarification regarding the process for case monitoring:

*Once a case is pulled for monitoring, is the case then pulled each month in addition to the other cases reviewed?*

- The regional offices indicated that if a case is pulled for a monthly sample case monitoring, it is generally not pulled again each month. If the case was reviewed as part of the intensive case review monitoring, it is pulled again each month through the 24-month process.

*Are cases only monitored that are 18+ months or are cases looked at sooner?*

- Regional offices indicated that for regions with smaller caseloads, they are looking at cases much sooner than 18+ months. For other regions, the cases with the most ticks are being targeted first to help with the 24-month preparation and regional feedback prior to the extension request.

*Are cases other than W-2T and/or CSJ reviewed?*

- Regions with fewer cases, and therefore the ability to review cases with less than 18+ ticks are looking at other placements as well (CMC, CMF, etc.)

#### **Issue/Discussion: Policy Communications, Steve Dow, DES/BWSP**

Committee members had expressed concern with the volume and variety of forms in which directions and information are shared with local agency personnel. Steve Dow explained the difficulty of coordinating written instructions to the field with CARES programming changes is one of the many issues affecting policy communications. CARES changes generally move once a month. The final decision to move new logic is made the Wednesday before the move. Move dates are planned in advance, and resources for programming and testing reserved. Due to the complexity of the work, however, problems are sometimes detected in testing that cannot be fixed in time to make the planned implementation date. Unintended results may also cause the analysts to reevaluate the specific changes that have been requested.

Many CARES policy changes involve multiple programs with multiple contingencies, which make exact scheduling even

more difficult. DXBM is used to notify all managers and workers of changes being made to CARES. They are done to ensure that all workers are aware of programming change, particularly when new screens or literals are added. It is the only method available to the Division to share critical information with all users in a very short period of time. DXBM's often advise workers of recent or coming Operations Memo's that provide formal notification of changes. Since it is not possible for DES to ensure that everyone sees policy memos, system implementation notices, and instructions at the same time, the primary objective is to notify agencies and workers that changes have been made.

Often, requirements for CARES work are dependent on outside inputs; federal law or rule changes, state law or rule changes, other agencies responsible for related functions are all examples. Sometimes essential information arrives very late and impacts the ability to make CARES and/or policy changes or announcements. These changes often require immediate action, difficult to coordinate written information, CARES, etc. on tight timeline. Federal response to waiver requests is often not timely (example: FSET exemption for caring for a child under one). Proposed changes are frequently revised at the last minute, making it difficult to prepare for final policy changes and coordinate written instructions, CARES changes, forms, brochures, notices, etc., to meet implementation deadlines. Handbook releases may take as long as 6-week delay between completion of revisions and mailing. On-line manuals will resolve some of the problems with coordination of changes to field and create other problems within local agencies.

To alleviate some of these problems the following recommendations were made:

- E-mails to agency administration, supervisors, etc. prior to DXBM
- Suggest agencies review their internal distribution systems.
  - ◆ Use of CATS to track pending CARES changes
  - ◆ Distribution of information in Operations Memos
  - ◆ Communication of DXBM information
  - ◆ Email distribution
  - ◆ Online instruction distribution
- Better sharing of information by IMAC and WSSA
- Add DXBMs to the listing in the RFP Appendix 9.6.

Deb Hughes disagreed with adding DXBM to the RFP, stating that DXBM is not an appropriate vehicle for sharing policy. Ed Kamin stated that in the past, policy was the manuals and suggested limiting policy distribution to one or two official documents. Mary Ann Cook indicated that local agency management processes the memos and then must integrate the information into the local operating process to implement changes. She questioned the placement of public records in the Partner Page that requires a security access. She suggested Regional offices email local agencies regarding upcoming changes.

Rick Zynda indicated there is a Communications Taskforce in place that addressed many of these issues. Committee members requested a report from the Taskforce at the January meeting. Deb Hughes also suggested the Department do a monthly policy report update similar to the monthly CARES report.

#### **Issue/Discussion: Emergency Assistance, Steve Dow and Ceri Jenkins, DES/BWSP**

1999 Wisconsin Act 9 expanded the eligibility criteria for Emergency Assistance (EA) to include needy persons facing "impending homelessness." According to the new language, a family is considered to be facing impending homelessness if, "the family is experiencing a financial crisis that makes it very difficult for the family to make a rent payment, mortgage payment or property tax payment and the family has been notified that it will be required to leave its current housing if it does not make that payment immediately." Despite the anticipated increase in caseload due to this change, there has been no increase in funding for EA.

Ceri Jenkins indicated that in order to develop the policy for the change to the EA program, it will be necessary to promulgate emergency rules. Once the policy is finalized, the emergency rules may be in place in as few as two to three weeks. An Operations Memo will be sent to the W-2 agencies to clarify policy and rules changes. DES staff have met with Judy Wilcox, Homeless Programs Administrator from the Department of Administration (DOA), Division of Housing which administers the Emergency Shelter Grant. Staff also met with representatives from three Milwaukee agencies, the Red Cross, Community Advocates, and Hope House, to discuss issues related to this change. The feedback from these meetings has focused the discussion and provided needed information for writing the rules and policy.



Rosa Dominguez stated that landlords find out what the policy is and evict tenants based on that policy. Mary Ann Cook cautioned against assuming procedures in Milwaukee are the same in the balance of the State. Ceri clarified that the Milwaukee shelter providers requested the meeting with DES. Before finalizing the policy change, DES staff need input from Committee members to get a sense of how these changes will impact the entire State. Rita Renner indicated that the average W-2 agency expenditure on homeless in Milwaukee County is between \$750 and \$1200. Committee members agreed that this is not an individual agency issue since it is a statewide appropriation.

Ceri asked committee members to mail their input regarding the following questions to Mary Ann Cook at [cook@co.dane.wi.us](mailto:cook@co.dane.wi.us) by Friday, January 7, 2000:

- 1) *Do we need to verify that a family is in financial crisis? If so, how should we do so?*  
Use a third party to confirm, such as the following:
  - If applicant has lost a job, call former employer to verify loss
  - If applicant has missed work due to illness, get medical statements from doctor
  - If financial crisis is due to car problems, get bill/statement for repair
  - Self-declaration in signed statement
- 2) *What kind of notice is sufficient to verify the termination of tenancy?*
  - Use 5 and 14 day notices (Are these too easy to obtain, making eligible pool for EA too large?)
  - Use summons to court for eviction
  - Foreclosure notices from bank/local government sufficient for homeowners
- 3) *Should we verify that family has sufficient income to continue paying their rent after the current financial crisis? The law does not require it, but should we consider it?*  
Possible proof of future income:
  - Call employer to verify employment
  - Applicant provides pay stub
  - Call FEP to verify W-2 participation
- 4) *Should we allow agencies to require that some EA recipients establish a payee, similar to W-2?*

#### **Issue/Discussion: Monthly Training/CARES Update, Gerry Mayhew, DES Training and Tim Hinline, DES/BWSP**

The committee was asked if they had any questions for Gerry Mayhew or Tim Hinline regarding the monthly reports that they received. There were none. Highlights of the monthly Training report include:

- The kick off meeting of the State Advisory Committee for the New Worker Re-engineering Process for Income Maintenance (includes W-2) workers occurred on December 14 and 15. Response to the Training Section's call for volunteers was very positive.
- The DES Training Section, in collaboration with DHFS is currently in the development stage for follow up training for BadgerCare.
- Training staff began development of a case comment self study guide and desk aid on November 30, 1999. The material will include information on the importance of case comments, suggested practices, how to document sensitive issues (such as substance abuse) and other relevant information.
- A new Enhanced Case Management module "Pregnant and Parenting Teens" will have a dry run in December and train the trainer in January and has been scheduled in local agencies beginning in March of 2000.

See attached CARES report. Tim Hinline reminded the committee that CARES will be down December 31, 1999. He also encouraged agencies to utilize the SSA State On-Line Query (SOLQ) access they have been given.

#### **Issue/Discussion: Other Issues**

##### *Options for SSI Cases*

Jude Morse shared a draft paper describing an option to create a SSI Case Exception for the Entered Employment Placement Rate Performance Standard.

##### *Participant Placement Charts*

Jude Morse distributed the charts that were shared with the Milwaukee Journal Sentinel. These charts show W-2 T participants and CSJ participants by number of months used in each county as of November 1999.

##### *Committee Coordinator*

Shari Busse announced this would be her last meeting as the committee coordinator. She is going to the Division of Supportive Living in DHFS. (I've enjoyed working with you all!)

**NEXT MEETING DATE:**

**Friday, January, 21, 2000**

10:00 a.m. – 2:00 p.m.

*201 E. Washington Avenue*

*GEF 1, Room 400X*

*Madison, WI 53707*

*608-266-7552*

**NOTE:** The January, 2000 meeting was cancelled and the next meeting took place 02/18/2000.



## RECENT AND UPCOMING CARES CHANGES OVERVIEW

Issued December 17, 1999

Major Initiatives: Completed or in Progress	DATE	BACKGROUND
<b>COLA Mass Change</b>	12/4/99	COLA Mass Change was successfully run on this date. There were 1167 individuals for which an extra updated sequence was added. A report of these cases along with instructions on fixing them was sent to agencies on 12/10.
<b>SSA State On-Line Query (SOLQ)</b>	12/31/99	Initial SOLQ access has been granted to 54 counties. Data sharing agreements must be returned before access is granted. If you have not received your agreement, please be patient. Extended access will be granted to supervisors when they have been properly identified.
<b>Participation Standards</b>	1/00	Work continues on producing the reports to be used to monitor Performance standards. Reports that will be available when the new contract period is in effect are listed in the November issue of InfoWorks, which can be found on the DWD Workweb. <a href="http://dwdworkweb/des/DESInfoworks/InfoworksNOV99.htm">http://dwdworkweb/des/DESInfoworks/InfoworksNOV99.htm</a>
<b>Food Stamp EBT</b>	2/00	Phase 1 of the statewide EBT rollout will begin in February 2000.
<b>Client Registration – Clearance</b>	2/00	Logic to resolve some duplicate PINs has been delayed until after the freeze to ensure full testing of the process. Duplicate PINs should be reported to the Call Center in the usual manner. Various causes of duplicate PINs are being researched and solutions to reduce their occurrence are being analyzed.
<b>Budget Bill Initiatives</b>	3/1/00	Now that The 2000-2001 budget bill has been signed the analysis to determine programming changes required in CARES has started. Removal of the 60-day residency requirement logic for W-2 applicants was migrated on 11/19/99.
<b>Clocks</b>	4/00	All 24 month clock changes and fixes have been implemented. Work will begin on a Federal clock in early spring and the 60 month clock expiration logic will be implemented at the end of 2000.
<b>Y2K</b>	Ongoing	Additional Y2K testing continues on a limited basis. Stuffers and/or mailers have been distributed discussing Y2K preparedness, early distribution of January benefits, and contingency plans for February. We continue to fine tune and test our internal contingency plans at all levels. The CARES unit is fine tuning its internal testing plan for 1/1/00.
<b>Major Fatals</b>	Ongoing	Fatals and Abends will continue to be fixed during the freeze. The overall number remains about 50 per week. The average daily transaction count is over a million transactions per day.
<b>System Documentation</b>	Ongoing	The software that we have been using to document each CARES process, which number in the thousands, will not be supported after 1/1/00. For this reason, we are converting all this documentation using new, more readable software. This is an extremely time consuming, detailed activity. In the process, we are determining exactly what each process is doing today and identifying processes that are not working as we thought they were working or as they should be working. Problem Reports will be produced and work scheduled to update the improperly working processes. This new documentation will make it easier to do updates to the system while reducing the risk of causing other unintended changes to the system.
<b>Simulation for Benefit Recovery</b>	On-Hold	Now that BVCC has been implemented, we will be resuming this activity. Other Benefit Recovery enhancements have been recommended by the User Group and are presently being researched.
<b>Community Reinvestment</b>	On-Hold	DES conducted a preliminary review of options. Once federal reporting requirements are determined, Deloitte Consulting will be asked for an estimate to implement in CARES.
<b>Major initiatives: In Planning/Development</b>		
<b>Quarterly reporting for Food Stamps.</b>	No date set	As a Food Stamp error reduction initiative, we are exploring replacing 3 months reviews with quarterly reporting for Food Stamps. Other error reduction strategies are also being considered.
<b>Client Notice Redesign</b>	No date set	Both a client and worker survey regarding notices and letters are being piloted in Racine County. After the results of the pilot are analyzed, the survey will be conducted statewide.